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ABSTRACT

This workshop presenter's guide is intended for use by administrators in training one another in the Project Leadership program developed by the Association of California School Administrators (ACSA). The purpose of this particular guide is to help school administrators with the implementation of the Education for All Handicapped Children Act (P.L. 94-142), which states that handicapped students should be educated with their peers in regular classrooms. The guide gives a brief historical perspective of P.L. 94-142, identifies some of the common problems associated with the implementation of P.L. 94-142, and shows how schools can identify and more effectively use resources already available to them. Written to be read aloud, the guide contains a script, suggestions for conduct of the session, masters of 16 numbered transparencies, participants' worksheets that correspond to suggested activities, 4 handouts that provide summaries of workshop content and bibliographic references, and a 9-item reference list. The package also includes a reading list for the use of the presenter. (IW)

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Resource Management: Coping with P.L. 94-142

A Presenter's Guide

Research Based Training for School Administrators

Center for Educational Policy

and Management

College of Education
University of Oregon

Eugene, Oregon 97403

EA018620

Resource Management: Coping with P.L. 94-142

PROJECT LEADERSHIP PRESENTER'S GUIDE

Prepared by the Research-Based Training for School Administrators Project

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A training model called Project Leadership developed by the Association of California School Administrators (ACSA) and directed by James Olivero was selected as a vehicle for the purpose of disseminating research and state-of-the-art materials to school administrators. Project Leadership is built upon two key ideas: networking and administrators training one another using scripted workshop materials called Presenter's Guides. This is a Presenter's Guide developed by the team at the Center for Educational Policy and Management (CEPM).

All members of our team at CEPM have contributed in some way to this material. They include William Auty, Ray Embry, Nancy Isaacson, Martha Landry, Scott Lane, Max Riley, and Hugh Watson. We are grateful to Debbie Rauch for her clerical assistance.

And finally, we are grateful to A. Lorri Manasse, Project Officer at the National Institute of Education; to James Olivero and James Slezak of the Association of California School Administrators; and to William Lahmann and Howard Coble of the Washington Association of School Administrators. These people contributed greatly in promoting and developing Project Leadership in Oregon and Washington.

USING THE GUIDE

The guide is written so that it can be read aloud, but we believe you will want to make changes and provide your own examples. You should adapt the material to your personal needs and the needs of your audience.

You are equipped with the Presenter's Guide, which contains a script and suggestions for the conduct of the session (in italics). In the pack you will find the following: (1) masters of numbered transparencies that have been designed to give visual emphasis to the main points of your presentation, (2) participants' worksheets that correspond to suggested activities, (3) handouts for participants that provide summaries of the workshop content and specific bibliographic references, and (4) a reference list of the sources cited or referred to in the test. Finally, the package includes a suggested reading list for you that is designed to augment the content of the packet and aid you in preparing for your presentation.

PRIOR TO THE WORKSHOP

1. Review the guide--script, transparency masters, and handout materials--prior to the workshop.

2. Prepare copies of handout materials for each participant.

3. Prepare transparencies from the "masters." These are especially appealing when colors are added.

4. Arrange for meeting room facilities: Ideally, the facilities will offer space for participants to write as well as areas for small group discussion.

5. Arrange to have an overhead projector, screen, three-prong adapter and extension cord in the meeting room. Insure that the room is equipped with a chalkboard or flipchart visible to all participants.

6. Arrange for coffee or other refreshments, if desirable.

OUTLINE

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1.0 INTRODUCTION

The ideas for this workshop on coping with P.L. 94-142 were developed in Oregon when the state was engaged in its first attempts to monitor compliance with the law. As the members of the team contracted to do this work went from school to school across the state, they became familiar with the problems faced by administrators implementing the law. In particular, they found that schools were not identifying or using the resources available to them. People within schools who could solve a problem together failed to do so because of lack of communication. Further, administrators in neighboring districts did not coordinate their activities. The team found school personnel in some districts struggling with problems already solved in another district only a few miles away. A phone call could have saved the duplication of effort.

This workshop will identify some of the common problems associated with the implementation of P.L. 94-142 and show how linkages between people and resources available in school districts can help schools respond to the challenge mandated for them by the law.

1.1 An historical perspective of P.L. 94-142

Before we look at the state law and what it means for administrators, we should examine the history of special education. In colonial times, education was primarily the responsibility of the family (Sarason, Doris, 1979). The care of the mentally ill and other social deviants was also the responsibility of relatives. There was some support offered by the community, but there was no institution charged with the task of helping these people. However, by the end of the nineteenth century, society's responsibility to

to care for the needy was established. Institutions such as prisons, almshouses, and insane asylums were built to help people who had trouble living in an unsheltered society. The institution was a place where a selectively ordered and refined world could be presented to the inmates.

In the early twentieth century, legislation for compulsory schooling provided the rationale for special education. The schools were forced to deal with the children who dropped out or were kicked out when they didn't fit the norms. Special, ungraded classes were set up for truant, delinquent and mentally handicapped children. These classes often functioned as clearinghouses where students were sorted according to their probable institutional placement. However, there were also children in these classes who could be trained for certain limited jobs in society, without institutionalization. As these children were identified more frequently, special education teachers needed to increase their effectiveness.

By the 1950s institutions were perceived to be providing only custodial care and to be doing that poorly (Rothman, 1971). The professionals in special education believed that if a child received a specially designed educational program in a supportive environment separate from the rest of school, there was a chance that the child could learn enough to get by in society. Special classes at that time were the first option for handicapped students.

It then became apparent to the people in the field that these children could not learn the necessary skills without interacting in normal classrooms. Along with a growing body of theory generated by research and increased practical experience with handicapped students, political power for special interest groups such as the National Association of Retarded Citizens and the United Cerebral Palsy Association was expanding. These groups cooperated with

lawyers to seek support for the handicapped through litigation. It was a coalition of lawyers, professionals (primarily based at the university), and consumer advocacy groups that brought together support to enact P.L. 94-142.

We can see that the treatment of the handicapped has changed as our society has changed. The Puritans integrated everyone into the same societal structure. Later, institutions were developed as the best means of encouraging all people to be a part of a stable society. In the last 80 years, schools have developed special classrooms for handicapped children. P.L. 94-142 states that handicapped students should be educated with their peers in regular classrooms. All of these stages represent the best solutions known to those concerned at the time.

1.2 Activity: Administer quiz on "What does the law require?"

As an introduction to P.L. 94-142, let's take a short quiz. Take a few minutes to mark these statements true or false.

PASS OUT QUIZES *(Handout #1)*

Take two or three minutes to answer the following True-False questions.

T F *If a handicapped child is being evaluated and placed by the county ESD, the county agency is responsible for ensuring the appropriateness of that placement.*

T F *Schools are not responsible for the medical services required by a handicapped child.*

T F *Students with certain handicaps must be placed in the regular classroom.*

T F *TMR students may not be placed out-of-district if there is a non-categorical resource room available in the district.*

F F *Once a handicapped child is placed in a regular classroom, he or she is subject to the same rules as the other children and should be disciplined in the same way.*

T F Districts must pay for the education of handicapped children.

T F IEP meetings must be held at the beginning of each school year.

This quiz is a set up for the following section. It was designed to demonstrate some of the common misconceptions of the law, not to be any kind of real test of knowledge. Therefore, treat the quiz lightly. It should be completed separately by the participants to reduce anxiety.

SHOW TRANSPARENCY #1
(same as handout)

Now let's score. None of the statements on this sheet is true. The responsibility for ensuring that a handicapped child is receiving an appropriate education rests with the district. That district may choose to contract with an outside agency for any or all of the services to an individual, but must see to it that the rights of parents and children guaranteed by P.L. 94-142 are protected. The right to a free and appropriate public education (FAPE) has broadened the definition of what public schools must do. If the evaluation team determines that the child cannot benefit from the institutional programs provided by the school without additional related services, then it is the responsibility of the school to arrange for such services.

The law does not specify that any particular treatment be given to a handicapped child. That decision is the responsibility of the IEP team. The law does not say that once placed in a regular class, a handicapped child should be treated the same as a normal child. If a child misbehaves as a result of his or her handicap, then the school may consider a more appropriate placement for that child. A disciplinary act that denies the child

an education (e.g., suspension) would be a violation of the child's rights.

P.L. 94-142 does not require school districts to pay for the education of the handicapped. It stipulates only that such an education be provided at no expense to the parents. Therefore, the district is free to seek alternative sources of funding.

Again, to show that the law is not as inflexible as it is sometimes interpreted to be, schools may schedule IEP meetings at any convenient time, so long as they are held once a year and provided that IEPs are in effect at the beginning of the school year.

If you disagreed with all of the statements, you are to be commended for having a better understanding of a complex law than the majority of educators in the U.S. P.L. 94-142 is new and has not been completely worked out in practice. Therefore, it seems appropriate to spend some time looking at the law to see what schools actually have to do. This will not be a detailed analysis of administrative responsibilities; that is left for another place and time. Rather, we will look at the general intent of the law.

1.3 Review of legal requirements

Let's start with the legislators'statement of intent. The Federal Register states that the purpose of P.L. 94-142 is

(a) To insure that all handicapped children have available to them a free appropriate public education which includes special education and related services to meet their unique needs.

(b) To insure that the rights of handicapped children and their parents are protected.

(c) To assist states and localities to provide for the education of all handicapped children, and

(d) To assess and insure the effectiveness of efforts to educate those children.

(a) through (d) are quoted from 45 CFR 121a.1.

The regulations specify:

--the types and severity of handicaps that are included under the law

SHOW TRANSPARENCY #2

--guidelines for evaluations of children, including criteria for selection of evaluation procedures.

--the form of the individualized education programs (IEPs) that are to be written for each eligible child

--the timeline of events leading up to and following the placement of a child in special education

--the appropriateness of the placement to the needs of the child

--the rights of handicapped children and their parents

The law does not mandate a particular solution; for example, it does not:

--specify the exact treatment to be given to any child

--require a specific amount of mainstreaming for any category of handicap or any individual student

--require that the cost of a handicapped child's education be born by the district (only that it must be "at no cost to parents").

P.L. 94-142, therefore, specifies a <u>problem</u> with which an administrator must deal--the existence of handicapped students who have a right to an education. The law further provides some guidelines to structure the decision-making <u>process</u> in formulating a response/solution to the problem.

This response must fit the unique situation presented in the administrator's own school district. P.L. 94-142 does NOT, however, provide the solution. This is left to the ingenuity of the administrator and his/her staff. While the failure of the law to provide a specific solution does not simplify the administrator's job, it does leave schools with more freedom than is generally acknowledged.

Looking at the examples previously given, the following legal interpretations and hypothetical situations illustrate the flexibility of response options:

1.4 Options available to administrators

This section is well suited to interactive discussion. Most of these treatment options could probably be obtained from the participants. This would break up the lecture format and get them involved. If you have plenty of time, you could break into 3 groups and generate options for one of the situations in each.

SHOW TRANSPARENCY #3

Situation #1

The law does not specify the exact treatment to be given to any child.

Given an orthopedically impaired student who requires specially designed physical education and a district without the services of an adaptive physical education specialist, the district may decide to:

1. Hire an adaptive P.E. specialist for the school in which the child is enrolled.
2. Pay tuition for the child in a neighboring district that has the services that the child needs.
3. Hire a P.E. specialist (if a large district) to serve as a consultant to

all buildings, receive referrals, help to write programs, and oversee implementation.

If a small district, join together with a neighboring small district to hire a P.E. specialist who can work as an itinerant consultant to each district, performing the work delineated above.

4. Send a currently employed P.E. teacher to receive training (course work or inservice) that would facilitate adapting the regular physical education curriculum to meet the needs of the handicapped child.

SHOW TRANSPARENCY #4

Situation #2 - The law does not require a specific amount of mainstreaming for any category of handicap or for any individual student.

Depending on the child's present level of educational performance and behavior problems, the placement options for a seriously emotionally disturbed (SED) child would include:

1. Regular classroom placement for the entire day, with counseling services provided by the school counselor and an ESD psychologist, or a professional from a support agency.
2. Part-time placement in a regular class, part-time placement in a special education resource room, and counseling as described above.
3. Academic instruction in a special education placement, mainstreaming for extracurricular and non-academic courses, and counseling as described above.
4. Full-time placement in a special education setting, utilizing special techniques such as behavior management programs and counseling support.

5. The services described above in #4, plus intervention in the home setting.
6. Special class placement in a district school other than the home school, in a classroom in a neighboring district, in a special private school for children with serious emotional problems, or in a residential setting.

SHOW TRANSPARENCY #5

Situation #3 - The law does not require that the cost of a handicapped child's education be borne by the district (only that it must be "at no cost to parents").

The district's options for sources of funding for a severely handicapped child requiring residential placement and numerous support services might include:

1. The district budget
2. Existing state or federal programs, grants, etc.
3. Contributions from public or private charitable organizations
4. Donations from private companies willing to contribute to programs for special needs of children
5. Insurance policies held by the child's parents
6. Some combination of the above (plus other alternatives determined to be available)

These three situations illuminate some of the issues involved in the provision of a free appropriate public education (FAPE). The first shows that treatment is not specified by the law. The IEP evaluation team determines the educational needs of the child. Then the decision is made concerning the best placement to meet those needs. It is the match between

needs and placement--the appropriateness--that is the prime concern of the law. The cost of the handicap label put on the child, or the fact that the services required are not traditionally offered by the school are not relevant factors to the placement decision. The degree to which a child is included in the regular school life is secondary to the appropriateness of the placement. If two placements are judged to equally meet the needs of the child, then the one closest to the child's placement if not handicapped shall be chosen.

The concept of least restrictive environment is to be understood situationally. A regular classroom may be restrictive for a child who cannot interact normally with other children. One cannot say that any placement is more or less restrictive than another without considering the individual needs of the child to be placed. Therefore, to speak of P.L. 94-142 as a law that mandates mainstreaming is not strictly correct. There will be more handicapped children in regular classrooms, to be sure, but the decision should always to be made case-by-case with the best interests of the individual in mind.

The third situation clarifies the free part of FAPE. The education of a handicapped child must be free to the parents. However, the district is also free to seek any available sources of funding. While that may initially seem cold comfort, there are many people who are willing and able to provide services to the handicapped. Some special education administrators have found that if they make some of their needs public, charitable organizations may donate such things as wheelchairs or labor.

It may seem that I am belaboring the issue of FAPE. However, it is important to realize that this concept lies at the heart of the law. It

also gives to the public school administrator several opportunities and responsibilities. The building principal is often in the best position to see that a handicapped child is placed most advantageously. The principal knows and regularly communicates with the children and all the teachers. For example, the itinerant support staff for special education, the school psychologists and the speech therapists report to the principal.

The supervision of itinerant staff is a problem in some districts. You might be challenged here by someone who says that in his or her district the speech therapist reports only to the director of special education. You could point out that although the therapist (or other itinerant specialist) may be formally supervised by someone outside of the building, some communication should develop between that person and the principal. The therapist is providing instruction and so his or her activities should be of interest to the principal. Since the therapist needs to schedule children and therefore must coordinate schedules with the school, it is in that person's interest to have a cooperative relationship with the principal. Within one school the principal can foster this link. At a system level, administrative policy should encourage supervisors of itinerant staff to formally contact the principals in the schools where they work.

The principal also has access to information about programs available throughout the district or, perhaps, in neighboring systems. P.L. 94-142 requires a coordination of the human and material resources necessary to solve the unique problems surrounding the education of a handicapped child. It is the administrator, usually at the building level, who can best facilitate the effective interaction of these resources. This may be difficult for the administrator who is used to initiating policy decisions and then expects them to be carried out uniformly throughout the school. There is

no such order, set by one person, that will permit a school to educate handicapped children as required by P.L. 94-142. School administrators should become aware of the benefits that will result from sharing responsibility with the people in the school who will plan for and provide services to the handicapped. The concept of linkage and the role of administrator as linking agent will be introduced now as a way of helping administrators with this task.

SHOW TRANSPARENCY #6

2.0 LINKAGE

Linkage may be defined as the process of closing gaps between people and resources (Havelock, 1969). Here, resources are considered broadly to include the knowledge, skills, and talents of other people. Linkage involves a systems analysis of the situation and is concerned with the interrelationships of people. If a person has a problem that can be solved without outside help, then there is no gap and therefore no need for linkage. For the rare problem that has no solution, the gap is too large. There are many cases, however, in which the person with the problem and the resource for solving the problem are relatively close together. Linkage is the strategy used to close the gap in such an instance.

The use of the word linkage may be new in this context, but the function is quite common. For example, if you want to buy a house and the owner wants to sell, but you can't afford the interest the bank will charge, a real estate agent may set up a deal where you borrow the money from the owner at a lower interest rate. The agent has linked you with the resource of the owner who

has the ability to sell the house without taking the full payment at the time of sale. Unions have acted as linking agents between workers and management. In some shops, a worker with a problem may call the union "fixer" who will come in and facilitate a settlement of the grievance.

2.1 Types of linkers (Havelock)

There are a number of different types of linkages that take place in education according to Havelock (1969). These include acting as conveyor, knowledge builder, innovator, leader, trainer, defender, and/or consultant. These roles are described next.

SHOW TRANSPARENCY #7

Let's take the problem of improving reading instruction in a school district as our example. A common solution is to employ a curriculum director who, as part of his or her duties, screens, evaluates and disseminates curriculum materials. This person is a conveyor of information. A committee of teachers from several schools may meet to set common goals for the reading curricula of the different grades and to decide what is important to include in a school curriculum for their district and how that content should be organized. They are therefore acting as knowledge builders and are performing a linkage function by bringing together the various concepts of good reading instruction to be found in the district. In his or her own room, a teacher might develop a new method of teaching a certain reading concept. The teacher could present his or her method to the other teachers at a faculty meeting and thereby act as an innovator.

Another response might come from a principal who goes to a workshop and learns of a new teaching method. If he or she generates excitement among the

teachers and convinces them to try the method, the linkage function of a leader has been performed. This new idea may require a specialized technique that the principal would teach the staff. Here, the principal is a trainer. To continue with the same example, an angry parent might call up to demand to know why his daughter is getting these crazy lessons and what has happened to basic skills. The principal must now be a defender to explain the rationale behind the method and show the parent how his daughter is receiving a superior education. At the risk of overworking this one example, there is one more linkage function to perform. A teacher could have trouble using the method. The principal would come in as a consultant to diagnose the teacher's problem and either suggest ways to improve instruction or, perhaps, send the teacher to another session of the original workshop.

These seven types of linkages (conveyor, knowledge builder, innovator, leader, trainer, defender and consultant) are not exhaustive of the variation in the linkage functions, nor are they the only way to be found in the literature of categorizing linkage. Any resolution of a problem by linkage (the closing of a gap between people and resources) that might occur in a school, will probably require a mixture of several of these.

OPEN FOR DISCUSSION

Sample questions to participants:

Do you have questions about the seven types?

Have you worked with one of these types before?

Is there a type of linkage I haven't mentioned?

Which of these functions do you find yourself performing most frequently?

I hope that the examples have demonstrated how linkage is a part of ongoing educational process. You may understand these examples in different theoretical terms (problem-solving, decision-making, etc.). Please feel free to translate linkage into an administrative model that works for you.

2.2 Linkage in school systems: Gaps between people and resources

To show how linkage can be used to solve some of the problems in educating the handicapped, let's look at some of the gaps between people and resources that often occur in schools.

SHOW TRANSPARENCY #8

. First of all, there is a gap between special education teachers and regular education teachers. As mentioned in the historical overview, special education developed separately from the rest of education. Professional guidelines encouraged special educators to set up a boundary between themselves and the regular classroom teacher. They were the experts on the handicapped. They decided that they could provide the best education for handicapped children in a setting separate from the rest of school. And that was true at that time.

Now, special and regular educators must coordinate their activities to best meet the special needs of handicapped children. However, both the physical and organizational structures of the school hinder this task. The principal may respond, as a leader, by reorganizing the school to reduce the separation of special and regular education. This may require moving the resource room in from a trailer. Or perhaps staff that takes care of custodial duties (lunch room or playground monitors) could be trained to work

with handicapped children, allowing the special education teacher to share break time with the other teachers.

As a conveyor, the principal could provide inservice education to help regular teachers deal with the needs of the handicapped (possible sources include state special education offices and the local ESD). By helping to coordinate separate agenda, the principal could act as a consultant during pre-IEP staffing of teachers, specialists, and other professionals who are involved in the provision of services to handicapped children.

SHOW TRANSPARENCY #9

. There exists a gap between special education curriculum and that of the rest of the school.

For the same reasons outlined above, the special education curriculum may become incompatible with that of the rest of the school. For example, the LD teacher may be using a DISTAR reading program while the elementary teachers are using a sight-word approach such as is promoted by Houghton-Mifflin. Children who have mild learning disorders are ill served if they must adapt to quite dissimilar teaching methods or texts in order to spend time in class with their peers. The principal, as leader, may respond by assigning a special teacher to the curriculum team. (The principal's leadership should be active if it appears that the split will continue on the team. The compromise solution may require some consultation or perhaps linking with outside sources for curriculum materials.)

SHOW TRANSPARENCY #10

. P.L. 94-142 requires active participation by parents in the educational planning for their children.

Such participation may be difficult to achieve, but there are a number of ways to work towards it. A consultant might help the participants at an IEP meeting communicate effectively. In talking to parents, the principal may have to defend the program suggested for a child by explaining the reasons for certain choices. On the other hand the principal's linkage function may be more than simply reactive. A principal doesn't have to help sell special education programs only when challenged. Mobilization of public support before plans take effect may be one of the most important links to parents that could be provided.

SHOW TRANSPARENCY #11

. There may be a gap between the need to provide timely service for the handicapped child and the unavailability of resources to support the procedure specified by law.

For example, the school psychologist may be available to the school only a limited number of days. The demand for evaluations may exceed what the psychologist can do. The principal, as consultant, may sit down with the special education teacher and set up a system of testing that involves finding a part-time aide to enable the teacher to do academic testing. The aide could be a volunteer parent who wants to become involved in the education of his or her child. Even a paid aide might be a cheaper alternative than paying for more professional time.

SHOW TRANSPARENCY #12

. While we are talking about money, let's look at the gap between increasing special education budget needs and declining revenues.

A principal can reorganize to save some money. The provision of transportation as a related service for a handicapped child is one new, and sometimes substantial, expense. Instead of contracting separately for each child or for a group of handicapped students, it may be possible to negotiate a contract for all of the school's transportation needs with one company and save money. By making special education a part of any public discussion of school activities, the administrator may make charitable organizations aware of the district's need for wheelchairs or other easily donated materials and services. It may even be possible to invent new sources of money. One principal obtained financial support by writing to a college classmate who had become an executive with an oil company. Obviously, any of these methods alone will not solve a serious budgetary shortfall. But, if one perceives the monetary needs of the handicapped as a part of the entire school's mission to serve all children, it may be possible to increase the school's support without creating any feeling that one group is being served at the expense of another.

SHOW TRANSPARENCY #13

. A common problem for schools is that some children have a definite need for services that are only required by a very small proportion of the school population.

These services may be expensive, such as physical therapy or catheterization. The principal as knowledge builder, innovator, and conveyor may be able to set up a system in which neighboring schools pool resources to provide needed services. Insurance companies stay in business because they sell to large groups of people. A few of those people will file very expensive claims, but the premiums paid by the others will be sufficient to settle them. With a small group, the serious accident is less likely to occur but if it happends, the insured must pay more to cover the costs. In the same way, schools may link together to reduce the risk of a small district having to bear the cost of educating a child with a rare, but expensive, handicap.

You may have noticed, and participants may also comment, that most of the examples of linkage involve solving problems within a school or between neighboring schools. P.L. 94-142 also requires that schools deal with agencies with whom they are not usually in contact (CSD, Mental Health, etc.). Linkage with these groups is often a challenge for school administrators. It is more difficult because the administrator is on unfamiliar ground. Conceptually, however, it is the same; he or she is attempting to close a gap between people and resources. Because of the difficulty in practice and the ninety-minute time limit, it was not discussed in the text here. A separate session on direction service, for example, would be needed to cover the topic. If you wish to mention external linkage, this would be the place to do so.

One approach would be to create a list of resources available in the regions from which the participants come. You could provide a good example of a linking agent and discuss your methods and any problems you had identifying agencies that serve children locally. The participants would surely appreciate your efforts because such lists of agencies are rare and short-lived.

2.3 Activity: Ask participants to list problem needs of the handicapped child

We've just looked at six problems, or gaps, that can be solved by linking people and resources. Take a few minutes and think of those kinds of problems you have faced or are currently facing in response to the needs of a handicapped child. Choose two such problems and write brief descriptions of each situation. Save the descriptions and we will use them in an activity later on.

Allow up to 5 minutes for participants to write problems.

2.4 Facilitating linkage in the schools: Traits and states

So far, I have presented linkage as a process. It's now time to talk about some of the skills and knowledge required to facilitate linkage in the school.

SHOW TRANSPARENCY #14

If I may be permitted to begin with a rough analogy, linkage is a little like putting in plumbing. You may want a sink over here, but your water supply is over there. The task, simply put, is to link the two. However, to accomplish the job may involve buying several kinds of pipe and different kinds of joints. If you are like me, you will not have the right tools for the job and will have to improvise a bit. In sum, putting in plumbing and

providing linkage requires solving a series of problems. And some of these problems will always be unanticipated.

The motivation for forming a link lies in a current unmet need for which there is not immediate help within the normal school organization. Since the school has procedures for dealing with the most easily anticipated events, one can assume that linkage will be a response to some new problem. P.L. 94-142 sets up new conditions under which schools must operate. The complexities of the law have not yet been worked out in practice. No one knows exactly how best to implement it. The best education that can be provided to a handicapped child depends upon the individual needs of that child and the unique system of resources available in the school.

Whatever program is chosen for that child, it will not usually be provided in the same form to another child later on. This is especially so in small districts. Unlike the plumbing in your house, the needs of the district for its handicapped children will change rapidly. For example, a small district may find itself with a completely deaf child to teach. Rather than hire a specialist to develop a program for that child, and then later shelve it until another deaf child comes along, only to find it obsolete, the district should enter into a consortium with neighboring schools. They could use a program designed to meet the needs of the higher number of hearing-impaired children in the region. The district would only have to make a small, temporary change to meet the individual needs of the child (hiring an aide to sign for t hild in certain classes). Note that the link, in this case with the regional program for hearing-impaired children, is temporary, but the process of linkage may continue. It is to the district's advantage to

maintain contact with the other schools, and perhaps donate some of its special education budget to the consortium, to keep up the programs it will need in the future. For example, in Oregon, Education Service Districts provide linkage resources for schools. They maintain a library of films and books and provide computer assistance to districts that could not otherwise afford such services.

You may open up here for discussion. The group may be able to generate examples of linkage from their experiences.

The educational administrator should be aware that the school is not a closed system, that it must respond to the world around. A problem-solving approach to the pressures brought on by change may be the most efficient response. Therefore, the best solutions to such problems, individual links, are situation dependent and are temporary. However, as the school continues to respond to changing outside influences, linkage will continue to be an effective solution.

So how does a school administrator facilitate linkage? The list of competencies for the linkage role would be quite long. The ability to communicate effectively and to encourage others to do the same, the ability to work with conflicting groups on a common project (principals may be familiar with the problem of being caught between the teachers and the central administration), knowledge of social and psychological literature relevant to education, knowldege of organizational and systems theory, understanding of the principles of educational management, familiarity with the history and philosophy of education, and the ability to absorb new knowledge quickly are some of the support skills needed. The list may seem intimidating, but as

practicing administrators, you all possess most of these abilities and have at least practical knowledge of the theory. It is not the point of this in-service to teach any of these skills in detail. (Any of them alone would be suitable for a ninety-minute workshop). I want to point out that linkage involves making a number of small changes in the organization and overcoming attendant obstacles. There is, in the literature of education, information that can help with this task.

The following discussion of variables affecting the implementation of linkage strategies is theoretical in nature. You may wish to summarize it in your own words. See R. G. Havelock, Planning for Innovation (Ann Arbor, Michigan: Center for Research on Utilization of Scientific Knowledge, Institute for Social Research, The University of Michigan, 1969) Chapter 4, for a fuller discussion.

A lot of this help lies in the research on planned change. We see there that the most important variables are those relating to the interpersonal dynamics of the people involved in your system. In reviewing the literature, Havelock (1969) looked for the characteristics of people who would respond well to linkage strategies. These characteristics can be divided into two categories: those that are more enduring and those that are transient. In the former we find such variables as the values and needs of individuals. Also, past experiences of people predict how they will respond to a new idea.

SHOW TRANSPARENCY #15

Cattell (1957, 1965) distinguishes between an individual's states and traits. One could consider the enduring characteristics of people to be

their sense of being threatened by an idea, and their ability to objectively process information. These may be called the individual's states. It is the interaction of people's states and traits that determine, to a large extent, how they will respond to a new suggestion, such as linkage, proposed by a person or group not a part of their daily routine.

Three concepts emerge from the consideration of a person's states and traits. One is the rational basis upon which that person makes decisions, the system an individual uses to evaluate new information. For example, a teacher may use the guidelines of his or her academic discipline or perhaps the model of a teaching methodology to judge the worth of a new idea.

A second concept is the individual's openness to change. This can be both a trait and a state. A teacher may be more open than most to new ideas, but refuse to consider rationally a particular option if it is seen as a threat to the teacher's professional or personal identity (DISTAR reading can have this effect).

Finally, the potency of the rewards offered has an influence on the acceptance of linkage strategies. When the pluses and minuses are added up, is there enough on the individual's plus side to make change worthwhile? I imagine this third concept is familiar enough not to require an example.

In addition to individual characteristics, the administrator should be aware of the individual's place in the organization. Specifically, does he or she have enough freedom to respond to the demands of a linkage strategy? Time is often a constraint. Do the teachers who have to get together have time to do so? Resources are not the only concern here. Do the demands upon classroom teachers allow them to adjust their performance expectations

enough to encourage handicapped students to participate? For instance, are results of a districtwide test in the teacher's subject area published in the paper, thus reflecting on the productivity of the school and/or the teacher?

In order to increase the chances of a new policy being accepted, the administrator should be aware of the interaction of the staff's individual states and traits as well as the structure of the organization in which they act. Special education as a field has evolved rapidly in the last few years and has also become an emotional public issue. P.L. 94-142 requires schools to solve the problems of education for the handicapped and, therefore, administrators should be sensitive to the abilities, expectations, and needs of the staff who serve the handicapped directly.

2.5 A hypothetical case study

Let's look at the hypothetical case of John, a ninth grade student with a specific disability in reading comprehension. He is bright and does well in classes that require less reading skill. The school psychologist and special education teacher have found a system that is helping John improve his reading. However, they are concerned that he associate with his peers so that his handicap will not separate him from the mainstream of school life. In particular they want him to enter the ninth grade English and social studies classes as well as first year typing. They need to sit down with the teachers of those classes to design an instructional program to meet John's needs. What sorts of problems can the principal expect and how should she help John?

SHOW TRANSPARENCY #16

The special education teacher has been a strong advocate of handicapped students in the past and her insistance that she knows best what the students need has made her a bit unpopular with the regular staff. The social studies teacher has been teaching 15 years in the district and has introduced some innovative curriculum ideas to the school's program. The English teacher is in his first year and is a little anxious about his ability. The typing teacher is another veteran of the school staff. He takes great pride in the success of his students in local community businesses.

The principal met the social studies teacher in the hall and mentioned that John needed to take part in a regular social studies class. The principal knew that the teacher was more interested in increasing the understanding of individual students than in just transferring subject matter, and also that she was capable of adjusting her style to meet John's needs. Therefore, it took only a quick, informal word to the teacher, perhaps assuring her that the special education teacher was willing to negotiate the plan of instruction, to make the link.

The next day the principal called in the typing teacher to discuss John. Fairly quickly, the teacher made it clear that he could not lower his standards for any individual. His reputation was based on the skill of his students. If a businessman hired one of these students and found he couldn't type, all future graduates would have a harder time. Unlike social studies, the discipline of typing inhibited the acceptance of handicapped students. That is one reason the principal decided on a more formal method of creating a link. She told the typing teacher she'd get back to him.

After school that day she went down to the resource room to work on a compromise for the typing teacher. She and the special education teacher set up objectives to put on John's IEP. If he attended class and made an effort to meet those objectives, he would get credit towards graduation. However, if he did not meet the standards set by the typing teacher for acceptable typing, his record would reflect that fact. The compromise seemed acceptable. While she was there, the principal reminded the special education teacher that the social studies teacher was good at her job and the compromise on instructional issues would be in John's interest.

Then they talked about English. Since the English teacher was nervous about his new job, the principal did not want to get involved directly and thereby increase his anxiety. She suggested that the special education teacher talk with him, being careful not to intimidate him with too many teaching prescriptions. He would respond well to ongoing support and would accept help, if provided in a nonthreatening manner.

In this example, the individual needs of a handicapped child created a problem for the school. He needed to participate in three classes, but could not do so unless the teachers adjusted their expecations for students. In general the task was the same--to link the special education and classroom teachers to design a program for John. But with each classroom teacher, different situations were encountered and the principal found different ways to proceed. Her success was not due so much to understanding the needs of a handicapped child, but to her understanding of the traits and states of the people in her organization.

2.6 Activity

Now that we have looked at some theory about linkage, let's try an activity and see if we can put this into practice.

This activity should be adapted to the needs of the participants and to the constraints of time. Choose one of the options.

OPTION I - Whole group discussion

This would be useful if you are short on time or have a very small group. Try to use the problems generated by the participants (p. 13) to promote discussion. The aim is to make sure that people have a clear understanding of linkage and can begin to see how it applies to the system in which they work.

OPTION II - Small group discussion

Have the participants work in groups of four or five. Again use the problems they described and let them discuss among themselves how they would use linkage to close the gaps defined. If you think the group needs a more structured activity, specify that they should categorize the type of linkage used.

OPTION III - Small group role playing

This activity requires the most time. Also, the participants should be comfortable interacting with each other (for the purposes of the activity, that means they probably aren't complete strangers, but most likely do not work together regularly). Depending on time available, have the groups each select several problems for role play. You might want to prepare short role descriptions on cards before the session, or for each problem, they could assign roles, take a few minutes to study, and then role play a situation that would bring them together (IEP meeting, faculty meeting, conference with principal are examples). The goal is to give the participants an opportunity to practice initiating links to solve problems associated with educating handicapped children. Usually only one role player will be doing this, so after discussing each role playing session, the group should switch roles and

try another one. A variation here would be to have some of the group members not assigned roles so they can observe. An empty chair can be left in the circle of role players. Observers who want to comment during the session, may identify themselves in a particular role (parent, another teacher, or some other involved person not a part of the original role assignments). The observer may speak in that role for a limited amount of time (usually one minute) and then return to observing. This allows the observer to encourage the role players to deal with an issue they may not see or are avoiding. The presenter may also sit in on a session in this way.

OPTION IV - If the presenter doubts the success of the exercise, case studies that could be substituted are included with this packet. See Optional Handouts 2, 3, 4.

3.0 SUMMARY

To sum up, let's evaluate linkage as a response to P.L. 94-142. The benefits of linkage lie primarily in the power it gives to plan rationally for a changing environment. More traditional theories of organization have stated that the work of a school could be divided among the workers. If subgroups with formally defined responsibilities, such as teachers, principals, and secretaries, worked towards their objectives, the overall goals of the organization would be met.

School administrators are finding, however, that they are subject to new pressures such as those caused by the passage of P.L. 94-142. Linkage provides the school with a method of meeting needs which cannot be easily met by the existing work organization. Links are small changes in the school that satisfy immediate needs. They are solutions that reflect the unique situation at hand. And, unless the need is recurring, they are temporary.

By encouraging linkage, an administrator can reduce the conflict that arises when groups in the school compete for limited resources. For example, conflict may arise when a special education teacher suggests that a classroom teacher's time should be spent providing a handicapped child with a specific instructional program. The classroom teacher might object that he only has limited time to teach and that he must decide how to best meet the needs of his class. When the two are linked, perhaps by the overall school goal of educating all of its students, the problem is no longer an interpersonal conflict. The two teachers can cooperate to discover the best means of educating the child. Each should be aware of the other's contribution to the school's mission.

A district may save money through linkage. Small changes within the school structure due to linkage should be cheaper than formal reorganization or the addition of a new unit. Linkage with other schools broadens the resource base to deal with low incidence handicaps (remember the problem of serving a deaf child in a small district). Thus we can predict that increasing the flexibility of a school by encouraging linkage will lead to more efficient responses to change in the school's environment. And therefore, in the long run, schools will save money.

There are costs in implementing change strategies. Any change in an organization involves more work than following routine--at least in the short run. Therefore, it is inefficient to start up a linkage process if the regular school organization will take care of the problem soon enough. If the administrator is to be the linking agent, he or she must judge whether the time saved in future situations calling for a similar response will be worth the time spent fostering the creation of a link.

There is also a price to be paid by individuals who are involved in linkage. Since they are interacting with people who belong to a different part of the school or even to another organization, they may experience increased stress. This is known in the literature as boundary crossing. Each group has expectations for the behavior of its members. It is stressful for an outsider to go into a new environment and encounter different expectations. The administrator who is familiar with all the groups involved in a link may function as a translator while the parties learn to communicate.

It is obviously a bias of mine that linkage is worth the effort. Do you, from your jobs, or perhaps from the discussion in our activities, have any questions or comments you would like to add to this session?

Open up for discussion here.

This is a general summary discussion and should last until almost the end (save enough time to introduce the last exercise). Participants should be encouraged to think about the practicality of linkage in their own schools and to voice any concerns here.

3.1 Concluding activity

I am now going to attempt to make a link between this session and the practice in your home district. When you get home I'd like you to try one or more of the ideas presented here today. Think carefully about the gap that created the need for a link, the states and traits of the people involved, the constraints of the organization, and the problems you encountered on the way. You should spend time reflecting because I'd like you to share the experience. I will distribute the names of the participants here today so that you can call up someone who is familiar with the concept of linkage and discuss what you did.

The presenter should be sure that the names, addresses, and phone numbers of all the participants are collected so that the list can be distributed. If the organization putting on the workshop cannot do this you may have to take time during the session to pass around a list for all to sign.

Make this call within the next month. Those of you in small districts, who might not deal with P.L. 94-142 that often, may alter the exercise by using linkage to solve another school problem or by designing a linkage strategy to deal with a problem you anticipate for next year.

Good luck and thank you for your participation.

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HANDOUT MASTERS

QUIZ

Take two or three minutes to answer the following True-False questions:

T F If a handicapped child is being evaluated and placed by the county Education Service District (ESD), the county agency is responsible for ensuring the appropriateness of that placement.

T F Schools are not responsible for the medical services required by a handicapped child.

T F Students with certain handicaps must be placed in the regular classroom.

T F TMR students may not be placed out-of-district if there is a non-categorical resource room available in the district.

T F Once a handicapped child is placed in a regular classroom, he or she is subject to the same rules as the other children and should be disciplined in the same way.

T F Districts must pay for the education of handicapped children.

T F IEP meetings must be held at the beginning of each school year.

CASE I

SETTING:

Edgewater is a small school district--about 500 students in two schools (grades 1-6 and 7-12); Ms. Anderson is the Title I/Special Education teacher based in the high school. There are also service agreements with ESD for speech therapy and some testing. Applegate, a larger school nearby serves some of the district's retarded and more severely handicapped students.

PROBLEM:

Your school has just been visited by the monitoring team from the State Department of Education. Here are three items from the report:

1) IEPs are not in effect at the beginning of the school year (district practice has been to hold IEP meetings during regularly scheduled parent conferences in November).

2) In one file, we found an ESD evaluation indicating a child is EMR. The report was dated winter 1979, but no services had been given by end of the 1979-80 year (parents refused placement in neighboring school).

3) The special education teacher seems to be overbooked and can only see children for a short time each day. (She has 20 children on individual instruction). If a child needs more services, the only option is a full-time, out-of-district placement.

As the newly hired elementary principal, you must work with the special education teacher and the high school principal/superintendent to write the plan of correction to be sent to the state. Ms. Anderson has worked for eight years as a classroom teacher in the district and has recently received her HLN. She is knowledgeable about the law, but seems to have had no success getting the support services or personnel she needs. The superintendent has indicated that he wants you take primary responsibility for the plan. How would you use linkage to correct the problems found by the monitoring team?

CASE II

SETTING:

Glendale is a school district of about 8,000 students. There are 11 elementary schools, 3 junior high schools, and 1 high school. The special education system includes an SLD teacher in each elementary and junior high school plus 2 in the high school. There are 2 elementary resource rooms, 1 junior high resource room and 1 high school resource room (all for EMR students). There are 2 resource rooms for EH students (2 elementary, 1 junior high). TMR and other severely handicapped are served in a self-contained classroom in one of the junior highs. Two school psychologists are hired by the district.

PROBLEM:

You have recently been hired as director of student services, which includes supervision of special education. In your third month on the job you receive a letter signed by all of the SLD teachers complaining of over-work (too many students, not enough time for testing, paperwork, etc.). Also, the Title I teachers are complaining about doing P.L. 94-142 paperwork. They feel that they can serve more children more effectively without certi-fying them as handicapped under the law. They are not cooperating with special education staff regarding referral and support for mainstreamed students. How will you proceed?

CASE III

SETTING:

East Cupcake is a school district of 5,000 children. There are ten elementary schools that feed into two middle schools and one high school. Special education is provided by in-school specialists with assistance from itinerant teachers and testers.

PROBLEM:

As principal of one of the middle schools, you are informed of a problem by the resource room teacher. Each year students identified by elementary school staff as handicapped enter the school, but only some of them are brought to the attention of the resource room teacher before school starts. Teachers have failed to refer some students until spring. Most of the students who get lost in transit are coming from 2 elementary schools. Within your school, classroom teachers say they can't be sure that the child is handicapped until they have tried to teach him/her for a while. How will you respond?

TRANSPARENCY MASTERS

QUIZ

Take two or three minutes to answer the following True-False questions:

T F If a handicapped child is being evaluated and placed by the county ESD, the county agency is responsible for ensuring the appropriateness of that placement.

T F Schools are not responsible for the medical services required by a handicapped child.

T F Students with certain handicaps must be placed in the regular classroom.

T F TMR students may not be placed out-of-district if there is a non-categorical resource room available in the district.

T F Once a handicapped child is placed in a regular classroom, he or she is subject to the same rules as the other children and should be disciplined in the same way.

T F Districts must pay for the education of handicapped children.

T F IEP meetings must be held at the beginning of each school year.

PROBLEM: TYPES OF HANDICAPS

Deaf

Deaf/Blind

Hard of Hearing

Mentally Retarded

Multihandicapped

Orthopedically Impaired

Other Health Impaired

Seriously Emotionally Disturbed

Specific Learning Disabled

Speech Impaired

Visually Handicapped

(OAR Chapter 581, Division 15, Section 005(3))

The law does not specify the exact treatment to be given to any child.

The law does not require a specific amount of mainstreaming for any category of handicap or for any individual student.

The law does not require that the cost of a handicapped child's education be borne by the district (only that it must be "at no cost to parents").

Linkage may be defined as the process of closing gaps between people and resources.

(Havelock, 1969)

SEVEN TYPES OF LINKAGE:

Conveyor

Knowledge Builder

Innovator

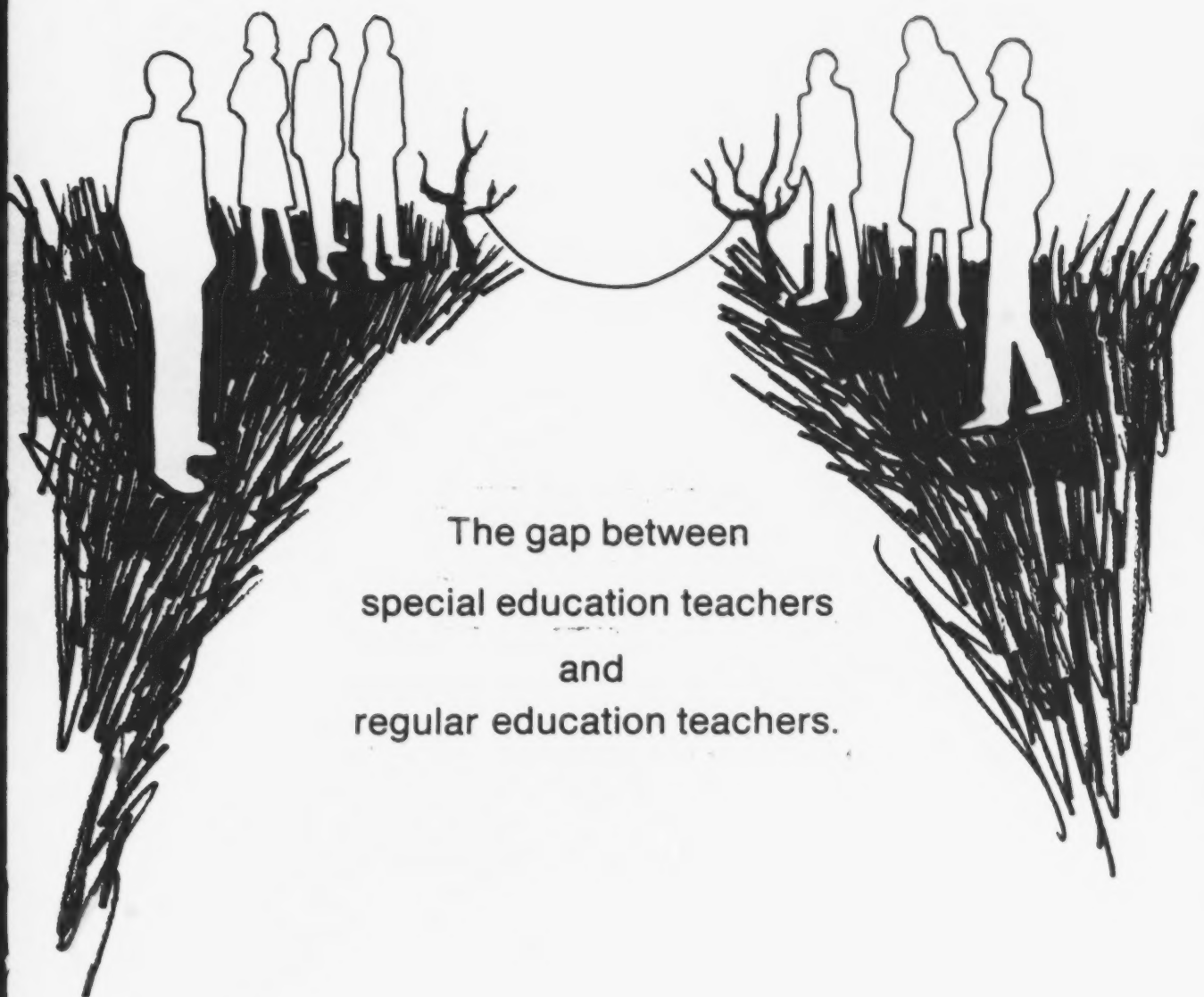
Leader

Trainer

Defender

Consultant

(Havelock, 1969)

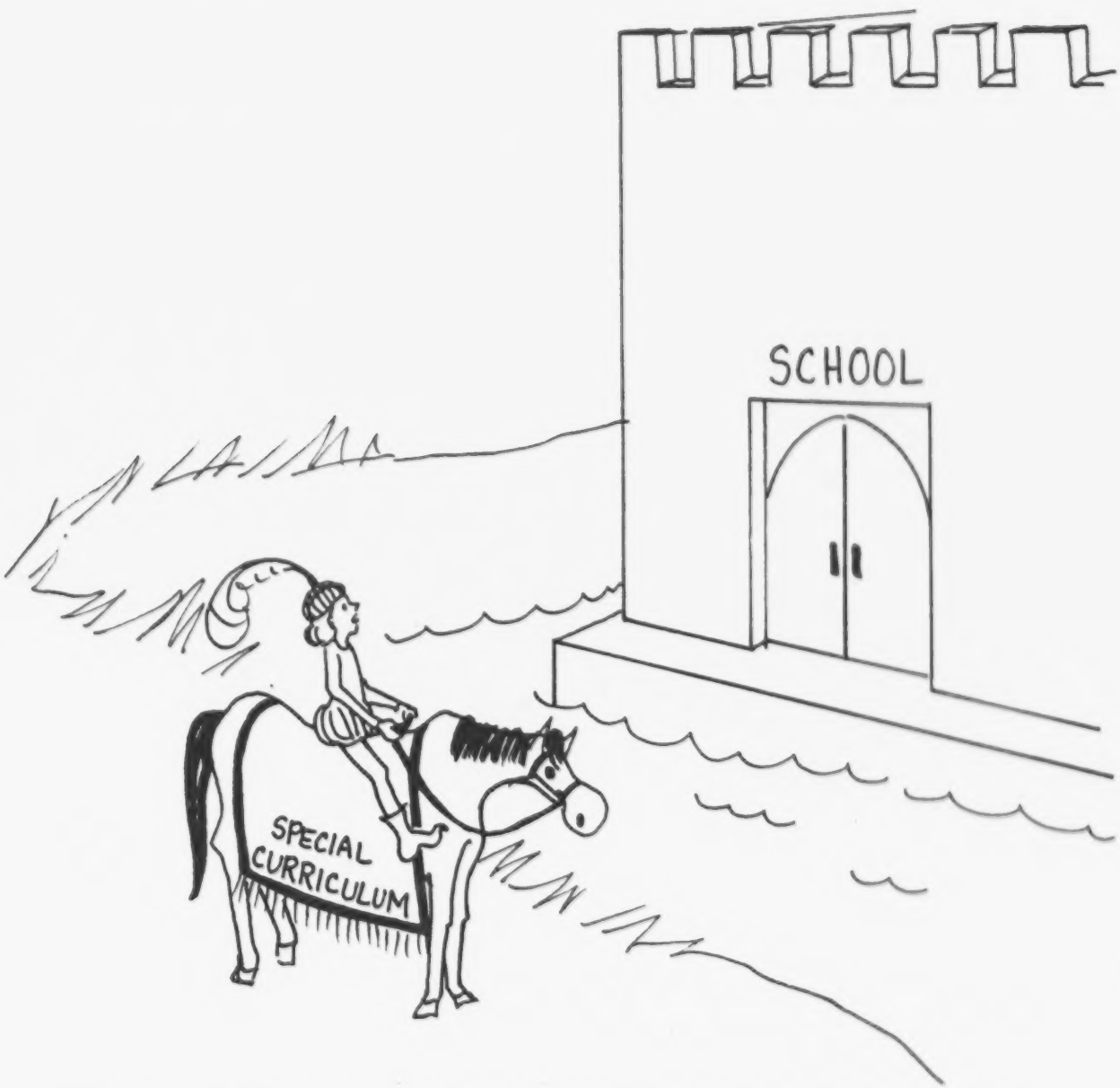


The gap between

special education teachers

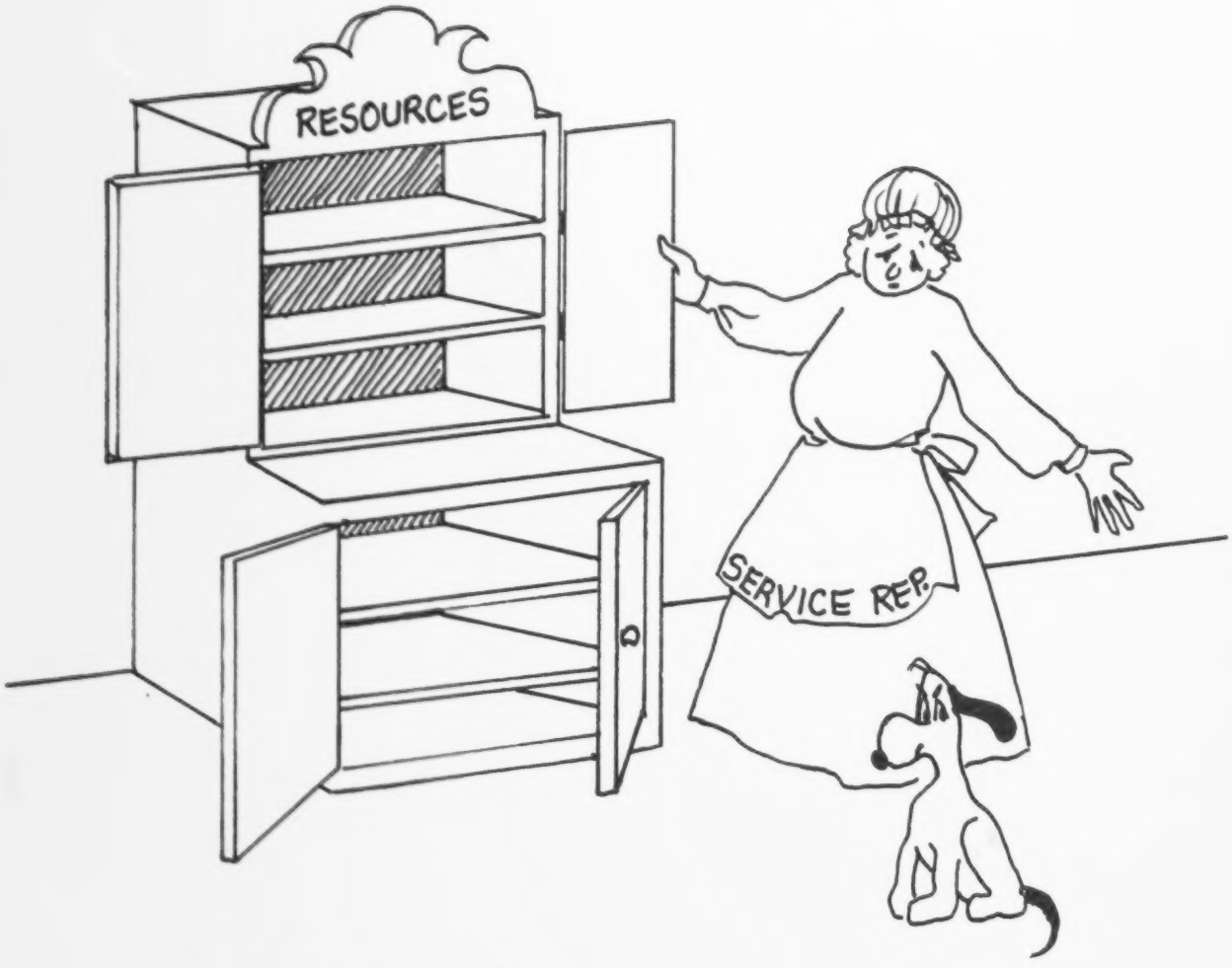
and

regular education teachers.

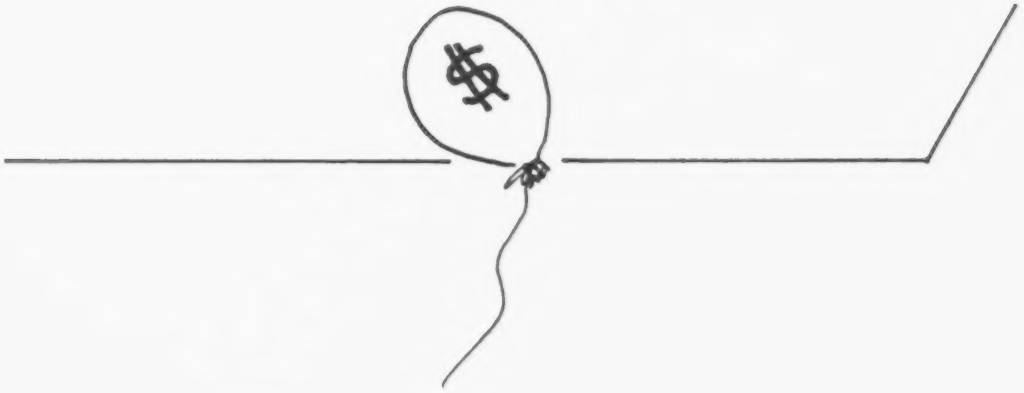


The gap between special education curriculum and the rest of the school.

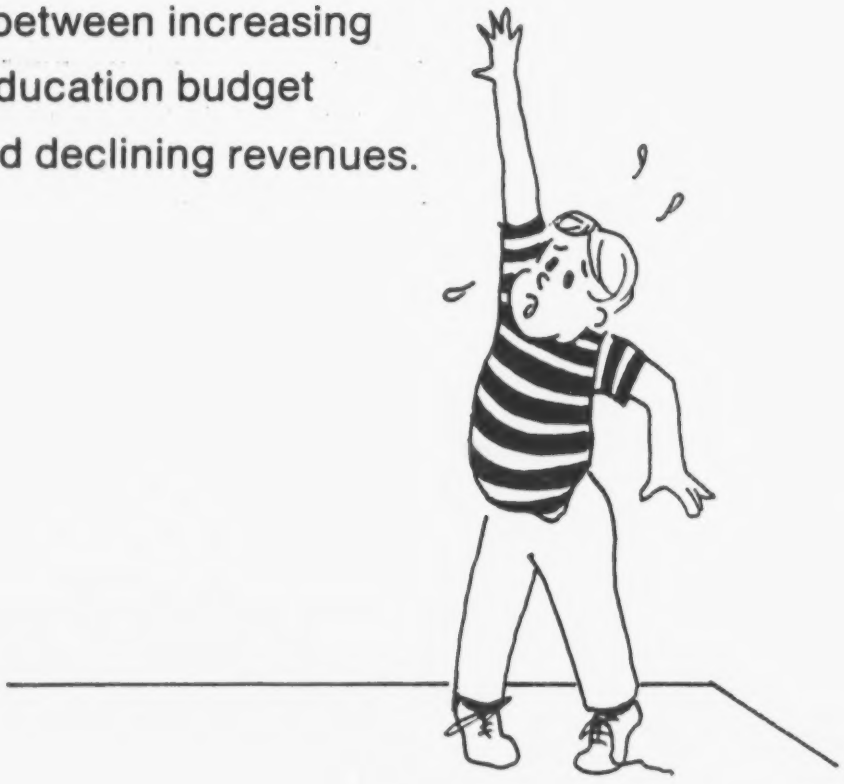
PL 94-142 requires active participation by parents in the educational planning for their child.



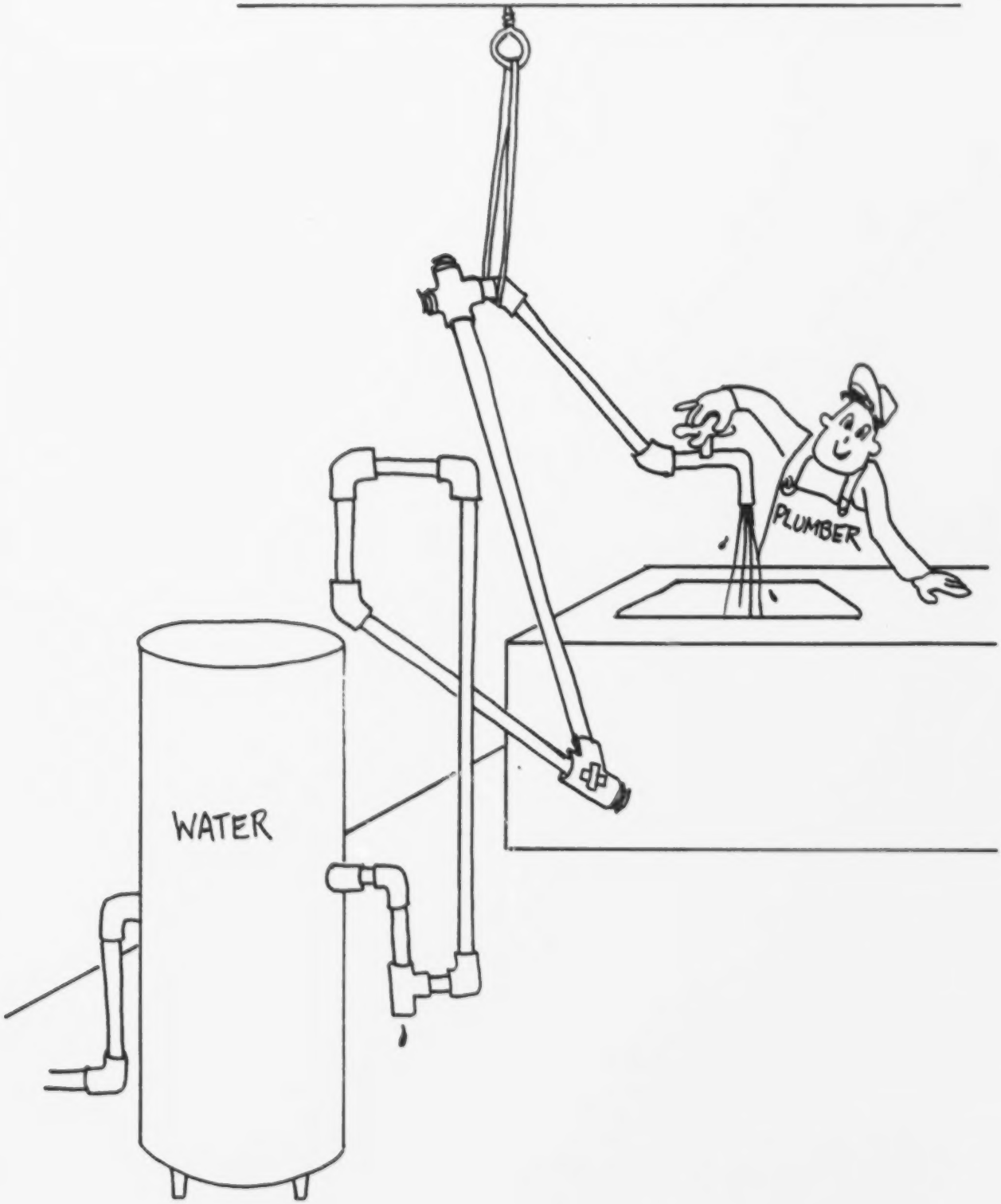
There may be a gap between the need to provide timely service for the handicapped child and the unavailability of resources to support the procedure specified by the law.



The gap between increasing special education budget needs and declining revenues.



Some children have a definite need for services that are only required by a very small proportion of the school population.


PLUMBER
WATER

TRAITS are the enduring characteristics of people.

STATES are the transient characteristics of people.

(Cattell, 1957)

94-142
NEW GAMES
LIT.
TYPING